

# SANS Securing The Human (STH)




State of Montana Information  
Security Awareness Training  
Program

## Administrator's Guide

One page cheat sheets on  
"How To"

# How to Use This Guide

- These one page cheat sheets are brief reminders of where to go and what steps to take for a variety of administrative tasks. The use of these cheat sheets may require an initial hands on training session from the ISSO.
- If more detailed assistance is needed please contact ISSO for assistance or training.
- Default Views - the first cheat sheet (next page) points out key parts to the home page that will impact success in completing certain tasks such as selecting the appropriate “Account” to effect the change being attempted.
- **Highlighted Menu Items** – the menu items to be used for the task being defined will be highlighted.
- Right Side of Page – Step by step instructions are provided on the right side of the page.
-  Arrows point from the instruction statement to the menu item(s) or group that relates to the instruction.



# DEFAULT view information

## State of Montana - Information Security Awareness & Training

James Ashmore [Logout](#)



Home ► Client Administration

State of Montana - Information Security Awareness & Training

### Account Status ☐

Seats Used: 1  
Queued Users: 0  
Seats Remaining: 2476

State of Montana

### Sub-accounts: 199

Seats Used: 6832  
Queued Users: 5555  
Seats Remaining: 5695

### Account Admin ☐

Customize Logo & Title  
Customize Emails  
Add Custom Content  
Customize Affirmation Message  
Completion Certificate

### Account Management ☐

Manage Sub-Accounts  
Assign Training Policy  
Add Users  
Allocate Users

### User Management ☐

Show All Users  
Assign User Training  
Manage Queued Users  
Manage Inactive Users  
View User Profiles

### Reports ☐

Summary Reports  
Historical Training

### End of Year ☐

Manage Reset Permissions  
Reset Training  
Release Seats

### Profile ☐

Change Password  
Choose Language (English)

### Help ☐

Contact Support  
Manual  
FAQ for Client Administrators  
Site Status

## Show Student View

- Introduction Pass
- ✓ You Are The Target Pass
- ✓ Social Engineering Pass
- ✓ Email and IM Pass
- ✓ Browsing Pass
- ✓ Social Networking Pass
- ✓ Mobile Devices Pass
- ✓ Passwords Pass
- ✓ Encryption Pass
- ✓ Data Protection Pass
- ✓ Data Destruction Pass
- ✓ Wi-Fi Security Pass
- ✓ Working Remotely Pass
- ✓ Insider Threat Pass
- ✓ Help Desk Pass
- ✓ IT Staff Pass
- ✓ Physical Security Pass
- ✓ Protecting Your Personal Computer Pass
- ✓ Hacked Pass
- ✓ Senior Leadership Pass
- ✓ PII Pass
- ✓ The Red Flags Rule Pass
- ✓ Ethics Pass
- ✓ Advance Persistent Threat Pass
- ✓ Cloud Pass
- ✓ Data Retention Pass
- ✓ Social Security Numbers Pass
- ✓ Privacy Pass
- ✓ Client Confidentiality in Law Offices Pass
- ✓ END Pass

**Default settings** – when SANS is opened or when menu pages are selected a default structure is viewed. The following list provides an awareness of what these default structures should contain and /or how they may be impacted by the selected account in **Account Status**:

#### Account Status > Top Level account

is selected by default (note that for some tasks this selection must be changed to the specific sub-account needing to be changed or updated).

**Account Admin** > This menu group is not effected by the Account Status selection.

**Account Management** > “Add Users” must have the Account needing change selected to complete process correctly. The other menu items in this group should have the Top Level account selected. The view will allow you to see all accounts for the other menu items.

**User Management** > In this group “Show All Users” and “View User Profiles” default view will only show the selected account. The other menu items in this group when the Top Level account is selected in Account Status you will be able to see all sub-accounts and make the appropriate change to each one individually or all together.

**Reports** > use this group with Top Level account selected in Account Status

**End of Year** > DO NOT USE


**Profile** > no effect

**Help** > no effect



# Adding new Users/Trainees

## State of Montana - Information Security Awareness & Training

James Ashmore 

Home ▶ Client Administration State of Montana - Information Security Awareness & Training

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State of Montana

  
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Completion Certificate

**Account Management** ☐  
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Assign Training Policy  
Add Users  
Allocate Users

**User Management** ☐  
Show All Users  
Assign User Training  
Manage Queued Users  
Manage Inactive Users  
View User Profiles

**Reports** ☐  
Summary Reports  
Historical Training

**End of Year** ☐  
Manage Reset Permissions  
Reset Training  
Release Seats

**Profile** ☐  
Change Password  
Choose Language (English)

**Help** ☐  
Contact Support  
Manual  
FAQ for Client Administrators  
Site Status

**Show Students**  
Introduction Pass  
✓ You Are The Target Pa  
✓ Social Engineering Pas  
✓ Email and IM Pass  
✓ Browsing Pass  
✓ Social Networking Pas  
✓ Mobile Devices Pass  
✓ Passwords Pass  
✓ Encryption Pass  
✓ Data Protection Pass  
✓ Data Destruction Pass  
✓ Wi-Fi Security Pass  
✓ Working Remotely Pas  
✓ Insider Threat Pass  
✓ Help Desk Pass  
✓ IT Staff Pass  
✓ Physical Security Pass  
✓ Protecting Your Person  
✓ Hacked Pass  
✓ Senior Leadership Pas  
✓ PII Pass  
✓ The Red Flags Rule Pa  
✓ Ethics Pass  
✓ Advance Persistent Th  
✓ Cloud Pass  
✓ Data Retention Pass  
✓ Social Security Numbe  
✓ Privacy Pass  
✓ Client Confidentiality in  
✓ END Pass

1. Make sure your **top level account** is selected to start this process
2. **Move** appropriate number of **seats** to the training group(s) where individual(s) is being added. Open **"Manage Sub-Accounts"** to move seats. Go to the account being effected and add seats using the **"Move Seats"** option.
3. Return to the **Account Status** and select the specific training group the individual is being added to (**select from drop down**)
4. Under Account Management open **"Add Users"** and enter the appropriate information.
5. Return to home page User Management and open **"Assign User Training."** Select the trainee(s) and **UN-CHECK** the E-mail Notification box, then click on **assign lessons**.
6. Return to home page User Management and open **"Manage Queued Users."** Select the new user and **ACTIVATE** user.

**NOTE:** all pages where you are making a change will have an option button or a pop-up option to **"Apply Changes"** or **"Confirm"** and/or **"OK"** to complete the process.



# UPDATE a User Account



## State of Montana - Information Security Awareness & Training

James Ashmore [Logout](#)

[Home](#) ► [Client Administration](#)

State of Montana - Information Security Awareness & Training

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State of Montana

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Completion Certificate

### Account Management

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Assign Training Policy  
Add Users  
Allocate Users

### User Management

Show All Users  
Assign User Training  
Manage Queued Users  
Manage Inactive Users  
View User Profile

### Reports

Summary Reports  
Historical Training

### End of Year

Manage Reset Permissions  
Reset Training  
Release Seats

### Profile

Change Password  
Choose Language (English)

### Help

Contact Support  
Manual

FAQ for Client Administrators  
Site

## Show Student

- Introduction Pass
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- Email and IM Pass
- Browsing Pass
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- Mobile Devices Pass
- Passwords Pass
- Encryption Pass
- Data Protection Pass
- Data Destruction Pass
- Wi-Fi Security Pass
- Working Remotely Pass
- Insider Threat Pass
- Help Desk Pass
- IT Staff Pass
- Physical Security Pass
- Protecting Your Personal
- Hacked Pass
- Senior Leadership Pass
- PII Pass

**View User Profile** – this menu item allows you to see the User account (name, e-mail, etc.), Training Assignment status, and e-mail activity. You can also **reset** the account to send out a **new e-mail and password**. Two approaches to view User Profile form:

1. Search Field > "Account Status" selection not important – open "View User Profile" and at top type in the E-Mail of the user in the search field, click on Search. The account should be listed on the page, open "Edit" to see the account profile, training status, and e-mail activity.
2. List of Users >
  - a) Select account the user is a member of (Account Status)
  - b) Open "View User Profile"
  - c) Find user name and open "Edit" at far right of list

### Viewing Profile for: James Ashmore (jashmore@mt.gov)

User Information	Training Assignments	Activity
Status: Active		
First Name:	James	
Last Name:	Ashmore	
* Email:	jashmore@mt.gov	
Your Own Reference:	DOA-ALL C	
Department:	DOA-SITSD	
* Mandatory In		
Update Details	Reset an	

### Viewing Profile for: James Ashmore (jashmore@mt.gov)

User Information Training Assignments Activity

### Student is assigned the following modules:

### Viewing Profile for: James Ashmore (jashmore@mt.gov)

User Information Training Assignments Activity

Last Login: Jan 14, 2014 16:09:49

### Student has been sent the following emails:

Template	Sent	From
Training Update Notification	Oct 02, 2012 20:29:49 (GMT)	mkeaster@mt.gov
Reports - Training Reminder	Dec 03, 2012 14:55:42 (GMT)	mkeaster@mt.gov
Account Reset	Dec 17, 2012 21:46:31 (GMT)	mkeaster@mt.gov

Step 1: Select Account: (State of Mon) OR Search Sub-Accounts for User

Results for account State of Montana - Information Security Awareness & Training

First Name	Last Name	Email	Department	Your Own Reference
James	Ashmore	jashmore@mt.gov	DOA-SITSD	DOA-ALL GROUPS





SANS



# Reports & Reminders

## State of Montana - Information Security Awareness & Training

James Ashmore [Logout](#)



Home ▶ Client Administration

State of Montana - Information Security Awareness & Training

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### Account Admin

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Completion Certificate

### Account Management

Manage Sub-Accounts  
Assign Training Policy  
Add Users  
Allocate Users

### User Management

Show All Users  
Assign User Training  
Manage Queued Users  
Manage Inactive Users  
View User Profiles

### Reports

Summary Reports  
Historical Training

### End of Year

Manage Reset Permissions  
Reset Training  
Release Seats

### Profile

Change Password  
Choose Language (English)

### Help

Contact Support  
Manual  
FAC  
Site

### Show Student

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- ✓ Working Remotely Pass
- ✓ Insider Threat Pass
- ✓ Help Desk Pass
- ✓ IT Staff Pass
- ✓ Physical Security Pass
- ✓ Protecting Your Personal
- ✓ Hacked Pass
- ✓ Senior Leadership Pass
- ✓ PII Pass

1. Make sure your **top level account** is selected to start this process
2. **Select Summary Reports** and then Account Details, Run Report.
3. **Results** page - Clicking on any blue number will generate a detailed list by trainee of their respective status. In the far right column if you see a check box this group can be sent an e-mail by clicking on "**Send Reminder E-mail**" or "**Send Completed E-mail**". Also both the **Summary Reports** and the **Results** detail can be exported to a CSV file you can open in Excel; click on **Export Data**.

NOTE: unless your organization has requested to control certificates, weekly the ISSO sends out the "Completed" e-mail notices for all other agencies.



## State of Montana - Information Security Awareness & Training

James Ashmore [Logout](#)

Home ▶ Reports State of Montana - Information Security Awareness & Training

### Select A Report

Account Details  
Provides an overview of training statistics across tiers

Run Report

Breakout Report  
Provides a breakout by subaccount for all users and a

Run Report

### Results

### Not Started

Export Data Send Reminder Email

First Name	Last Name	Email	Department	Reference	Enroll Date	No. Assigned Modules	Email Sent	Select All Unselect All
Dennis	Ahlgren	dahlgren@mt.gov	DOA-BFID	DOA - Annual	2013-10-28	18		<input checked="" type="checkbox"/>
Daniel	Birlut	dbirlut@mt.gov	DOA-GSD	DOA - Annual	2013-10-28	18		<input checked="" type="checkbox"/>
William	Gianoulas	bgianoulas@mt.gov	DOA-RMTD	DOA - Annual	2013-10-28	18		<input checked="" type="checkbox"/>
Ruth Anne	Hansen	ruhansen@mt.gov	DOA-DO	DOA - Annual	2013-10-10	18		<input checked="" type="checkbox"/>
David	McAlpin	davemcalpin@mt.gov	DOA-STAB	DOA - Annual	2013-10-28	18		<input checked="" type="checkbox"/>

Home ▶ Reports Department of Administration Information Security Training and Awareness Program

### Results

Export Data

Click on the numbers below for further detail.

Level 0	Level 1	Enrolled	Not Started	In Progress	Completed
DOA - Administration		3	0	0	3
DOA - Administration	DOA-Annual	241	6	3	232
			6	0	3
			0	0	39
			0	0	0
			0	0	2
			1	3	141
			0	3	42
			13	9	462



# Certificates

## State of Montana - Information Security Awareness & Training

James Ashmore [Logout](#)



[Home](#) ► [Client Administration](#)

State of Montana - Information Security Awareness & Training

### Account Status ☐

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State of Montana ▼

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### Account Management ☐

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Assign Training Policy  
Add Users  
Allocate Users

### User Management ☐

Show All Users  
Assign User Training  
Manage Queued Users  
Manage Inactive Users  
View User Profiles

### Reports ☐

Summary Reports  
Historical Training

### End of Year ☐

Manage Reset Permissions  
Reset Training  
Release Seats

### Profile ☐

Change Password  
Choose Language (English)

### Help ☐

Contact Support  
Manual  
FAQ for Client Administrators  
Site Status

## Show S

- ✓ Introduction P
- ✓ You Are The
- ✓ Social Engine
- ✓ Email and IM
- ✓ Browsing Pas
- ✓ Social Netwo
- ✓ Mobile Device
- ✓ Passwords P
- ✓ Encryption Pa
- ✓ Data Protecti
- ✓ Data Destruct
- ✓ Wi-Fi Security
- ✓ Working Rem
- ✓ Insider Threa
- ✓ Help Desk Pa
- ✓ IT Staff Pass
- ✓ Physical Sec
- ✓ Protecting Yo
- ✓ Hacked Pass
- ✓ Senior Leade
- ✓ PII Pass
- ✓ The Red Flag
- ✓ Ethics Pass
- ✓ Advance Pers
- ✓ Cloud Pass
- ✓ Data Retentio
- ✓ Social Securi
- ✓ Privacy Pass
- ✓ Client Confide
- ✓ END Pass

NOTE: Completion Certificates are issued weekly by the ISSO which sends out the "Completed" e-mail notices for all agencies. A few exceptions are those agencies who have requested to manage this process for their organization.

At this time we do not have an automated process to update HR training records with this completed information. You will need to make sure the user/trainee provides a copy of the certificate for their HR record or you can run a Summary Report and export for your records on all users/trainees.

If your agency desires to manage this process please contact the ISSO.

CPE credits – the default certificate from the SANS completed training issues 1 hr CPE credit on the certificate. If you have certified professionals such as Accountants, Auditors, IT systems, and Information Security, etc. , the ISSO can issue a 2 hr CPE certificate based on the added modules requiring on average 2 hours (120 Minutes) to complete, which is over the 50 minute per hour standard by most accreditation requirements.



# Moving or Removing Users

State of Montana - Information Security Awareness & Training

James Ashmore [Logout](#)



Home ► Client Administration

State of Montana - Information Security Awareness & Training

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## Account Management

Manage Sub-Accounts  
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Allocate Users

## User Management

Show All Users  
Assign User Training  
Manage Queued Users  
Manage Inactive Users  
View User Profiles

## Reports

Summary Reports  
Historical Training

## End of Year

Manage Reset  
Reset Training  
Release Seats

## Profile

Change Password  
Choose Language

## Help

Contact Support  
Manual  
FAQ for Client Administrators  
Site Status

## Show Student

Introduction Pass

✓ You Are The Target Pa

✓ Social Engineering Pas

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✓ Mobile Devices Pass

✓ Passwords Pass

✓ Encryption Pass

✓ Data Protection Pass

✓ Data Destruction Pass

✓ Wi-Fi Security Pass

✓ Working Remotely Pas

✓ Insider Threat Pass

✓ Help Desk Pass

✓ IT Staff Pass

✓ Physical Security Pass

✓ Protecting Your Person

✓ Hacked Pass

✓ Senior Leadership Pas

NOTE: use this process to move trainees from one training group to another. For example when employee no longer work for your organization or is reassigned to a new position which requires different training. ALL TERM EMPLOYEES will be moved to the Agency HOLD Account. **DO NOT DELETE ANY TRAINEES/USERS.**

1. Make sure your **top level account** is selected to start this process
2. **Select Allocate Users.**
3. **In left column** select from drop down list the specific account to be moved from. Highlight name(s).
4. **In right column** select from drop down list the specific account to be moved into.
5. Click on **"Move Selected"** and then **Apply Changes.** A pop-up will ask to confirm, respond appropriately.

## Select Accounts You Wish to Transfer Users Between

\* Queued User (Not Yet Activated in the Database)

Account

.DOA-Annual

Enrolled Users:

Aaron Harbaugh  
Amber Conger  
Amber Godbout  
Amber Long-Thorvilson  
Amy Dominick  
Angela Gifford  
Angela Vittatoe  
Angie Melby  
Ann Brodsky  
Aric Curtiss  
Armond Sergeant  
Arnold Hatling  
Barry Bass  
Bertha Stein  
Bonnie Shoemaker  
Bonny Belling

Use the Ctrl or Shift key to select multiple users

Account

.DOA-Hold Account

Enrolled Users:

Cary Levandowski  
\*Christopher Kuntz  
Colleen Cleary-Boyer  
James Sheehy  
\*James Ahern  
\*Jeffery Brandt  
\*Linda Christopher  
Marvin Eicholtz  
Michael Krings  
\*Nels Strandberg  
Paige Tabor  
Patricia Doherty  
William Allen-Hold  
William Olson

Click To Transfer Users

Move Selected >

Move All >>

< Move Selected

<< Move All

Apply Changes

Abandon Changes



# Help, Training, Contact Information

The Information Systems Security Office (ISS), Risk Management section is the state wide contact for the State of Montana Information Security Awareness Training program. If you would like assistance with training new organization administrators for this program, more detail on the use and administration of this program, or any other help and assistance please use the following resources to obtain this assistance:

1. Routine Training, Administration Assistance, Program ,or Software problems.
  - a) Submit a service ticket request:  
Servicedesk.mt.gov (Online)  
[servicedesk@mt.gov](mailto:servicedesk@mt.gov) (E-Mail)  
406-444-2000 (Phone)
2. Emergency/Urgent time sensitive assistance to resolve InfoSec training records/issues.
  - a) Call ISSO staff  
Jim Ashmore 444-2571  
Ron Kosenia 444-4557  
Lisa Vasa 444-2898
3. Other contact and information resources:
  1. InfoSec Web Site: <http://infosec.mt.gov/default.mcpix>
  2. General Risk Management E-Mail Box: [DOASITSDRiskMgt@mt.gov](mailto:DOASITSDRiskMgt@mt.gov)

# Reset Password



## Montana Department of Public Health and Human Services

Home ▶ Client Administration Montana Department of Public Health and Human Services

### Account Status

Seats Used: 0  
Queued Users: 0  
Seats Remaining: 25

HHS – Public Health & H...

### Sub-accounts: 12

Seats Used: 61  
Queued Users: 2888  
Seats Remaining: 2888

### Account Admin

Customize Logo & Title  
Manage Themes  
Customize Emails  
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Allocate Users

### User Management

Show All Users  
Assign User Training  
Manage Queued Users  
Manage Inactive Users  
View User Profile

### Reports

Summary Reports  
Historical Training

### End of Year

Manage Reset Permissions  
Reset Training  
Rel...

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- ✓ Data Destruction Pass
- ✓ Wi-Fi Security Pass
- ✓ Working Safely Pass
- ✓ Insider Threat Pass
- ✓ Help Desk Pass

Home ▶ View User Profiles State of Montana - Information Security Awareness & Training  
Step 1: Select Sub-Account: State of Mon OR Search Sub Accounts for Use  
Search Sub-Accounts

## Results for account State of Montana - Information Security Awareness & Training

Queued User (Not Yet Activated in Database)					Hide Queued	Hide Active
First Name	Last Name	Email	Department	Your Own Reference		
James	Ashmore	jashmore@mt.gov	DOA-SITSD	DOA-ALL GROUPS		

### Viewing Profile for: James Ashmore (jashmore@mt.gov)

User Information	Training Assignments	Activity
Status: Active		
First Name:	James	
Last Name:	Ashmore	
* Email:	jashmore@mt.gov	
Your Own Reference:	DOA-ALL GROUPS	
Department:	DOA-SITSD	
	* Mandatory Information	
Update Details	Reset and Email Login Details	

### Viewing Profile for: James Ashmore (jashmore@mt.gov)

User Information	Training Assignments	Activity
------------------	----------------------	----------

Last Login: Jan 14, 2014 16:09:49

### Student has been sent the following emails:

Template	Sent	From
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Reports - Training Reminder	Dec 03, 2012 14:55:42 (GMT)	mkeaster@mt.gov
Account Reset	Dec 17, 2012 21:46:31 (GMT)	mkeaster@mt.gov

### Student is assigned the following modules:

Lesson	Assigned	Status
Introduction	2013-08-30	2013-10-09
You Are The Target	2013-08-30	2013-10-09
Social Engineering	2013-08-30	2013-10-09
Email and IM	2013-08-30	2013-10-09